SiteManager Training Manual

Module A
Chapter 2

Contract Administration
Contract Records
Contract Authority

Section A-1-2-7-1

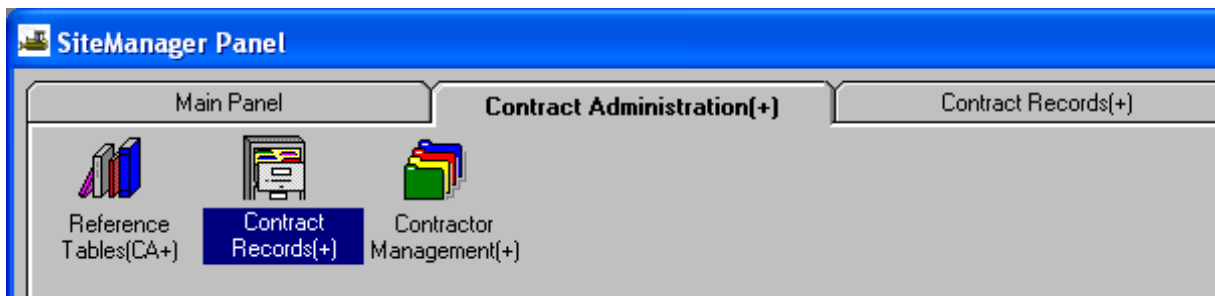# Assigning Contract Authority to a User

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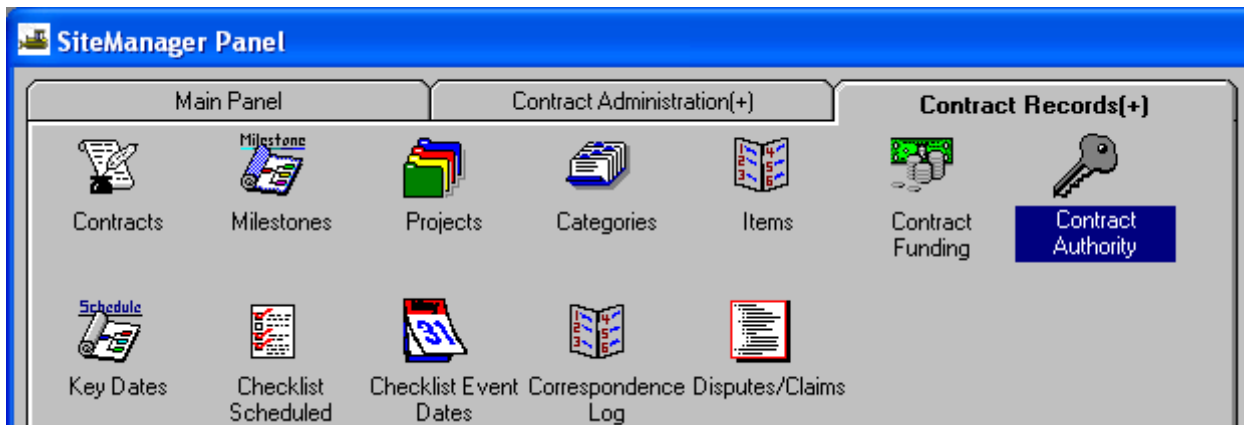
Assigning Contract Authority to a User

This document will explain how to add, and view, a user's Authority to a specific contract. The Contract Authority panel displays the users, office levels, office-wide access indicator, and user group assignments.

"Double-click" on the **Contract Administration (+)** icon located on the Main Panel.

"Double-click" on **Contract Records (+)**.

"Double-click" on **Contract Authority**.

Adding contract authority to a User

The **Contract Authority** window appears. Use the Find, Filter or Sort functions to locate the appropriate User ID or User Name.

"Click" on the appropriate **User ID** or **User Name** of the person that is to be added to a contract.

The contract and user group assigned to the person selected appears in the bottom panel.

Group Description: The **Group Description** contains all the current user's active group assignments.

Office-wide Access: The **Office-wide Access** checkbox indicates whether the user has access to all of the Contracts within a set area.

Contract ID: The **Contract ID** indicates the particular contract the user has access to.

Contract Description: Contract Description is the description of the contract, when a user is assigned rights. It is automatically populated.

Authority Start Date: The **Authority Start Date** is the date when a user is assigned rights. It is automatically populated.

Authority End Date: The **Authority End Date** is the date when a user is removed from a contract it is automatically populated.

"Click" on the **New** ▯ button located on the toolbar.

The **New Contract Group Authority** window appears.
"Click" on the appropriate **Group Description** for the user from the drop-down list.
NOTE: that only the Groups that have user rights will appear.

The **Contract ID** can be searched by "right-clicking" in the **Contract ID** field.
"Click" on **Search**.

Use the Find, Filter or Sort functions to locate the appropriate contract.
"Double-click" on the appropriate **Contract ID**.

"Click" the **Save** 🖬 button located on the bottom toolbar.

The new user group assignment appears in the **Contract Authority** Assignment panel with the current date and time automatically filled out in the **Authority State Date** field.

"Click the **Close** button located on the toolbar to exit the window.

Removing Contract Authority from a User

It may be appropriate to assign a Contract End Date in the future for personnel that may be leaving a contract on a particular date in the future.

Use the Find, Filter or Sort functions to locate the appropriate **User ID** or **User Name**.

"Click" on the appropriate **User ID.**

"Click" in the bottom panel.

"Click" on the appropriate **Group Description** associated to the appropriate **Contract ID** whose authority will be ended.
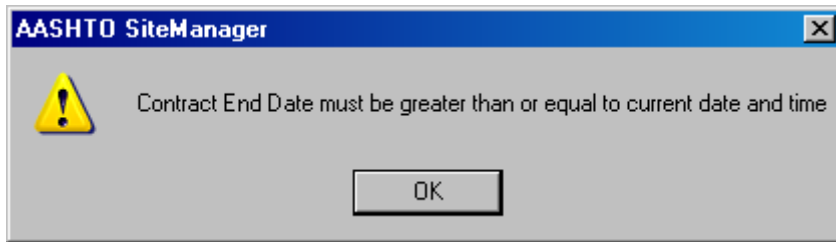
"Click" on **Services** button located on the menu bar.

"Click" on **End Contract Authority**.

The **Contract Authority End Date** window opens with the current date and time in the **Contract End Date** field.

It the current date and time are not appropriate "double-click" on the time/date field and "enter" the appropriate date/time. Note: The user has authority until the following day.

The **Current End Date** must be the current date/time or a future date/time.

The end date will appear in the **Authority End Dt** field in the **Contract Authority Assignment** panel.

"Click" the **Close** button located on the toolbar to exit this window.
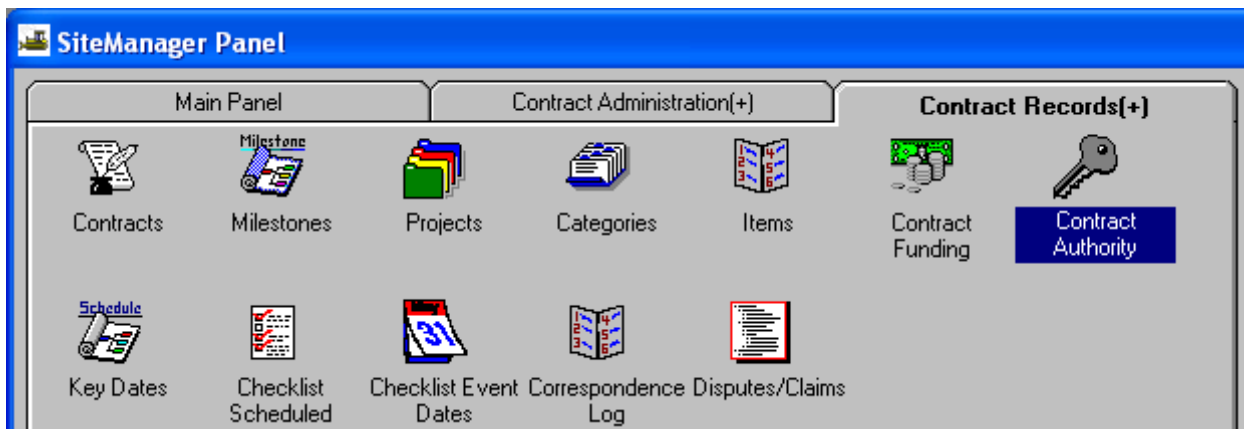
To view contract Authority

The Contract Authority panel displays the users, office levels, and user group assignments.

"Double-click" on the **Contract Administration** icon located on the Main Panel.

"Double-click" on **Contract Records (+)**.

"Double-click" on **Contract Authority**.

The **Contract Authority** window appears. "Click" on the appropriate **User ID** or **User Name** of the person.

The contract and user group assigned to the person selected appears in the bottom panel.

Group Description: The **Group Description** contains all the current user's active group assignments.

Office-wide Access: The **Office-wide Access** checkbox indicates whether the user has access to all of the Contracts within a set area.

Contract ID: The **Contract ID** indicates the particular contract the user has access to.

Contract Description: Contract Description is the description of the contract, when a user is assigned rights. It is automatically populated.

Contract Description: Contract Description is the description of the contract, when a user is assigned rights. It is automatically populated.

Authority Start Date: The **Authority Start Date** is the date when a user is assigned rights. It is automatically populated.

Authority End Date: The **Authority End Date** is the date when a user is removed from a contract it is automatically populated.

"Click the **Close** button located on the toolbar to exit the window.

Assigning Contract Authority to a User

Exercise A-7-1-T
Group Exercise
View and assign Contract Authority to User

Log into SiteManager as   update
Password   pass

Navigate from the **Main Panel**:
"Double-click" on **Contract Administration**
"Double-click" on **Contract Records (+)**.
"Double-click" on **Contract Authority**.
"Click" on the appropriate **User ID** or **User Name:** "Hank R. Chief" or "d90hchie"
"Click" on the bottom panel
"Click" on the **New** button on the toolbar.
"Click" on the appropriate **Group Description** for the user: District Construction Technician
Right –click on the **contract ID** window.
"Click" on Search
"Double-click" on the appropriate **Contract ID:** R90002
 "Click" the **Close** button on the toolbar.

Removing Contract Authority from a User

Navigate from the **Main Panel**:
"Double-click" on **Contract Records (+)**.
"Double-click" on **Contract Authority**.
"Click" on the appropriate **User ID** or **User Name:** "Hank R. Chief" or "d90hchie"
"Click" on the appropriate **Contract ID:** R90001
"Click" on **Services** on the Menu bar.
"Click" on **End Contract Authority** in the Dropdown Menu.
"Enter" tomorrow's date in the **Contract End Date** field
"Click" **OK**
"Click" the **Close** button on the toolbar.